

Wells, Mike

From: Wells, Mike
Sent: Wednesday, July 23, 2014 2:20 PM
To: Green, Amberet; Bray, Dave
Cc: Janis Hastings
Subject: Cheat Sheet for deciding what goes into new file room--Informational Only, no action required

Hi Amberet and Dave—Sharing the below guidance in case OAWT staff ask you questions about what's appropriate for your new file room. Reminder that the principal approved way back by the ET Lease subgroup was that the Distributed File Room (ex. OAWT's file room on 15) is for **active, frequently referenced, shared, Records...**

From: Wells, Mike
Sent: Wednesday, July 23, 2014 12:48 PM
To: Psyk, Christine; Woodruff, Leigh; Macchio, Lisa; Livingstone, Gail; Whitaker, Melissa; Kim, Hyon-Su; Washington, Audrey; Bouck, Steve; Patheal-Centenera, Bella; Chung, Angela; Croxton, Dave; Jennings, Marie; Lidgard, Michael; Opalski, Dan; Parkin, Richard; VanHaagen, Paula
Cc: Chin, Joanne
Subject: Following up on Christine's message "Records Preparation..."--Cheat Sheet from Records Liaison Officer

See guidance below for how to make decisions about what should go to the 19th floor secure file room (DFA). The goal is a pristine, secure file room with only records, where all records are properly identified by series and barcoded in Versatile. Highest priority to lowest:

1. Active records organized by series (ex. 214a Drinking Water Authorization...), in folders, and barcoded with Versatile Barcodes—DFA
2. Active records organized by series, clearly labeled in folders, but without Versatile barcodes--DFA
3. Active records that are either not organized by series (i.e. contain "mixed series") or not clearly labeled—DFA, but need work
4. Mixture of Record and nonrecord materials that need to be identified, separated and processed—Consider pulling to be staged/processed
5. Nonrecord Material (technical reference, personal papers, duplicates, etc.)—Keep only if necessary and store separately from Records, not in DFA
6. Obsolete or unneeded nonrecord material--DESTROY

Other categories of things that shouldn't go into DFA:

- Record material that has surpassed its retention requirement can be recycled. An official destruction form is required for documentation of that. Reminder: Anything subject to FOIA or litigation hold must be preserved and cannot be destroyed.
- Record material that is closed/inactive, but has not yet reached its retention requirement, should be sent to the Federal Records Center.
- Record material that is seldom referenced, ex. less than 1/month, but still active and still needs to be kept onsite, can be transferred to CRC on 16th floor.